

TEACHERS' RETIREMENT BOARD
BENEFITS AND SERVICES COMMITTEE

SUBJECT: Regional Counseling Services

ITEM NUMBER: 9

ATTACHMENT(S): 0

ACTION: _____

DATE OF MEETING: April 6, 2000

INFORMATION: X

PRESENTER(S): Dennis LeBlanc/Bill Skates

At the March 2000 Board meeting a number of issues were raised regarding the current services being provided by CalSTRS retirement counselors. In reply to those concerns the following information is being provided:

Since 1986 CalSTRS, using contract employees hired by the individual county offices of education, has provided both individual and group retirement counseling sessions for members considering retirement. These sessions have grown in popularity and in fiscal year 1998/99 approximately 24,000 individual interviews and 490 group workshops were provided to CalSTRS members. The recent passage of legislation enhancing retirement formulas and providing new benefit options not only increased the demand for counseling services, the time required to conduct our counseling interviews has increased from approximately 60 minutes to 75 minutes. While CalSTRS did anticipate a significant increase in the demand for counseling services, the present demand is causing appointment delays in some locations.

Before addressing the approaches being taken to address the counseling demand shortfall, it is necessary to look at the counseling service in more depth. There are approximately 52 individual counselors servicing 1100 school districts throughout the state. These counselors work, for the most part, on a part time basis equating to 26 full-time counselors and positions. These positions are funded based on the prior year's demand for services. For the most part, the county offices of education provide space for the interview locations and CalSTRS provides the necessary training, dollars for equipment, travel and salary compensation. CalSTRS also contributes dollars to offset the expense for interview scheduling and training expenses. A trained counselor is someone who has received at a minimum three months of training and experience regarding the many aspects of the CalSTRS differing benefit programs and has also demonstrated skills in both the technical and people aspects of the counseling position. Due to the importance of the retirement interview the quantity/quality aspects of the interviews are equally important. The CalSTRS/County Office of Education partnership arrangement has worked well for over 13 years. In the past, when fluctuations in demand have occurred, additional hours being worked by individual counselors, or members traveling to adjacent locations was an effective solution. However, the service demand increases we have seen recently, which we fully expect to continue, will clearly not be handled by such short term remedies.

Currently appointments must be made at least four to six weeks in advance to allow time for the file request to be sent to CalSTRS Headquarters; have the microfiche pulled and filmed; return it by US Postal Service to the counselor's office; and allow time for the counselor to review the record and conduct further research on-line before the interview. The appointment scheduling is further complicated when members insist upon time preferences and a particular counselor to be scheduled for them.

Anticipating the increase in the demand for counseling services, the Teachers' Retirement Board approved a significant dollar augmentation to the Regional Counseling budget for the 2000/2001 fiscal year. These funds are being allocated based on the demonstrated need for additional services experienced over the last six to 12 months and will be used to add additional counselor positions.

Unfortunately, because of budget implementation delays and the need to recruit and train new counselors, the remedies listed above will not significantly reduce the delay members are experiencing when scheduling appointments before July 2000. The following steps have been implemented in all counseling offices experiencing scheduling delays:

- Available counselors have been asked to provide additional hours of counseling time;
- If an immediate appointment is required and the member is sure they are going to retire, an emergency appointment is scheduled at the desired location or at an agreed upon alternate location;
- A recent semi-annual all counselor conference was postponed to allow more time for existing counselors to add time to their appointment schedules;
- Members who have had multiple appointments are encouraged to update estimates by using the web-site estimate program;
- Headquarters staff has been working with support staff and counselors in all areas to improve scheduling and workload efficiency.

CalSTRS is anticipating significant efficiencies with the implementation of imaging technology and an ever improving web-site. In the future, the counseling program will benefit from these technologies by reducing the time now needed to retrieve members' records from the headquarters location and direct some members, who have already had one appointment, to the web-site for an update of their benefit calculations. Both actions should help clear counselor appointment calendars.